



REQUEST FOR PROPOSAL (“RFP”)

RFP Title: Configuration and Implementation Services- Microsoft Dynamics CRM	RFP #: 15160008
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SECTION 1 – INTRODUCTION

The purpose of this section is to provide general information about the International Development Research Centre (“IDRC”, “the Centre”) and this RFP.

1.1 IDRC OVERVIEW

IDRC is a **Canadian Crown Corporation** established by an act of Parliament in 1970.

IDRC was created to help developing countries find solutions to their problems. Through its grant making activities, IDRC encourages, supports, and conducts research in the world’s developing regions, and seeks to apply new knowledge to the economic and social improvement of those regions. IDRC aims to reduce poverty, improve health, support innovation, and safeguard the environment in developing regions.

IDRC employs about 380 people at its Ottawa, Ontario, Canada head office and at its four (4) regional offices (Cairo-Egypt, New Delhi-India, Nairobi-Kenya, and Montevideo-Uruguay). For more details visit idrc.ca

1.2 PURPOSE OF THIS RFP

The *Enterprise Resources Planning (ERP) Systems Replacement* program is a key initiative which will be a priority for IDRC over the coming two years. The program is comprised of replacing existing ERP software used within IDRC for both its’ Grants and Project Management (GPM) system and the current ERP used for financials, procurement and other internal processes. In addition to replacing their existing ERP systems, IDRC is reviewing all of their workflows and internal processes in order to increase automation, gain efficiency and realize overall cost savings.

IDRC is issuing two RFPs to support this initiative. Specific to this RFP, IDRC requests proposals from Microsoft Gold and Silver certified service partners to provide IDRC with configuration and implementation services for the most recent version of Microsoft Dynamics CRM. IDRC is implementing a new Grants and Project Management system based on the Microsoft Dynamics CRM platform to replace its current, custom built Grants and Project Management system. IDRC has the licenses and requires a partner to help with developing, configuring and implementing the solution.

A second RFP 15160007 has been issued for the replacement of the current financial ERP. IDRC will be contracting an integrator in RFP 15160007 to implement Microsoft Dynamics NAV. It is the intent of IDRC to issue two separate contracts and Proponents are free to bid on either or both. Both RFPs require proposals for a complete solution which includes the operating environment on-premises.

All requirements for this RFP are described in section 2, the Statement of Work (“Services”).

The “go-live” date for this project is April 1st, 2016. For the purpose of this RFP, go-live is taken to mean a complete configuration and implementation of Phase I functionality in the CRM system in IDRC’s production environment including full integration with the new NAV application.

1.3 DOCUMENTS FOR THIS RFP

The documents listed below form part of and are incorporated into this RFP:

- This RFP document
- Annex A – Mandatory Requirements Checklist
- Annex B – Rated Requirements Checklist
- Annex C – Pricing Requirements Checklist
- Annex D – IDRC GPM Governance Structure
- Annex E – Lifecycle of research projects
- Annex F – ERP and GPM Integration Points

1.4 TARGET DATES FOR THIS RFP

The following schedule summarizes significant target events for the RFP process. The dates may be changed by IDRC at its sole discretion and shall not become conditions of any Contract which may be entered into by IDRC and the Successful Proponent.

Event	Date
RFP issue date	See cover page
RFP Enquiries Deadline	See section 5.1
RFP close date	See cover page
Evaluation, Presentations if required, Selection, and notification of Successful Proponent	By August 7 2015
Finalize Contract with Successful Proponent	On or before September 4, 2015
Commencement of Project *	Five working days after signature of contract

*Assumes RFP process and contract negotiation completes on time.

SECTION 2 – STATEMENT OF WORK

2.1 INTRODUCTION AND PROJECT OVERVIEW

IDRC wishes to enter into a Contract with a recognized Microsoft Certified Partner. Gold and Silver Partners will be considered. This Partner will work with an IDRC team of subject matter experts to configure and implement a new bilingual (English and French) grants and project management system (GPM) based on the MS Dynamics CRM platform.

The current GPM system is custom built for IDRC, leading to high costs for changes or upgrades. It is the intent of IDRC to leverage the standard configurable functionality of MS Dynamics CRM. It is the desire of IDRC to avoid customization in order to reduce the complexity of future upgrades, encourage standard business practices, and facilitate adoption of native workflow, mobile access, and paperless transactions. Ultimately, IDRC seeks lower annual maintenance costs, a simplified upgrade path and better access by users either while in the office or on travel via connected mobile devices.

Partners with proven experience in the configuration and implementation of MS Dynamics CRM will be considered. Experience using innovative approaches to configuration in order to meet the unique needs of IDRC is also a prerequisite for consideration. The successful Proponent will be asked first to complete a gap/fit analysis to assess which capabilities can be satisfied from the CRM platform base functionalities through configuration and to challenge IDRC on best and simplifying practices. IDRC will work with the Partner to configure workflows that will streamline the business processes required to support the grant administration function. IDRC requires a configurable solution (on-premises) which can readily be revised to accommodate changing business needs of the Centre that are the consequence of new funding or changes in granting modalities. The new GPM system will be accessible to all employees involved in the administration of grants and projects. It will also furnish information to Program employees through a more intuitive interface in order to satisfy ad hoc querying of current project details.

A comprehensive GPM application is expected to be an evolution of our understanding of requirements and the effective capabilities of the Dynamics CRM and integrated technologies (such as Dynamics NAV and SharePoint or others). Consequently the GPM implementation is organized into two phases. **This RFP encompasses only Phase 1** which will include a base functionality supporting an operational Grants and Project Management application live as of April 2016. Phase 2 will include adjustments, extensions, and significant optimization of workflows throughout the subsequent fiscal year (April 2016 to March 2017).

The objective of a functional Grants and Project Management System integrated with the ERP system should be ready by Feb. 2016 for adequate release testing, and given the earliest start date of Sept. 2015, the implementation time frame would be about 6 months.

While it is the intent of IDRC to issue two contracts for the ERP Replacement initiative, proponents should consider that there will be numerous integration points between the ERP Financials on the Microsoft Dynamics NAV platform and GPM on the Microsoft Dynamics CRM platform (see Annex F for further details). The proponent must therefore recognize that they will be required to work with the IDRC project team and the successful proponent of RFP 15160007 – Licensing and Implementation of

Microsoft Dynamics NAV Financial ERP System, to ensure an effectively integrated solution. It should also be noted that proponents may submit proposals for both this RFP and RFP 15160007.

IDRC intends to enter into an agreement for an initial implementation period commencing September 2015 followed by a 3 year support contract with an option to renew, at IDRC's discretion, for up to two (2) additional three (3) year terms.

2.2 BACKGROUND

Development assistance is in transition as emerging economies play a more significant role, non-state actors are more active, and foreign, trade, and development policy are increasingly aligned. Demographics and the distribution of wealth are changing as urbanization and aging intensify, inequality continues to rise, and middle-income countries become home to the majority of the poor, and an increasing share of the poor live in failed and fragile states. A shift is also underway in how development takes place, with growing expectations on the part of citizens.

Through these changes, knowledge and innovation remain key drivers for improving people's lives in the developing world.

IDRC has consistently invested in knowledge and solutions that have had lasting impacts. To make knowledge a tool for addressing pressing challenges, IDRC provides researchers in developing countries with the financial resources, advice and training that will help them find solutions to the local problems they identify. IDRC also encourages sharing knowledge with policymakers, other researchers and communities around the world. IDRC disseminates research findings and strives to get new knowledge into the hands of those who can use it.

Enterprise Resources Planning (ERP) is the foundation supporting the Centre's financial and administrative processes. As in any organization, ERP systems are crucial to IDRC's effective and efficient operation and must be capable of adaptation to meet evolving business needs. One significant element of the ERP Replacement Initiative involves replacing GPM, the system used for grants and project management.

The ERP Systems Replacement project is a key initiative which will be a priority IDRC over the coming two years. It is a joint initiative between the Finance and Administration Division (FAD), Grant Administration Division (GAD), and Information Management and Technology Division (IMTD), sponsored by the Office of the Vice-President, Resources.

Existing grant administration processes stem from the original design of GPM in 1999. Since that time IDRC has evolved significantly from two different perspectives: first, there has been mounting pressure to demonstrate program impacts and to link them to research project outputs; second, the advent since 1999 of more diversified non-parliamentary funding from various Donor foundations and special initiatives has created a need to identify expenses more clearly to the funding partners. Both trends have significantly impacted operating procedures to the point where IDRC's processes have become more complex, non-intuitive and in certain instances, inefficient.

Changes to the grant administration processes over the past few years, necessitated by an evolving business model, have been extremely difficult to accommodate within the custom built GPM system. The complex code base that supports GPM has become an obstacle to timely revision resulting in a support system that fails to efficiently meet all the needs of the organization. Moving forward, it is IDRC's goal to have an ERP system which provides the ability to modify and enhance our system in a timely and efficient manner, both in terms of cost and labour. During the implementation process it is IDRC's desire to introduce effective workflows and make the system available to users and approvers throughout the Centre, whether they are in Head office or Regional offices or accessing the system through remote mobile devices.

2.3 OVERVIEW OF GRANT ADMINISTRATION

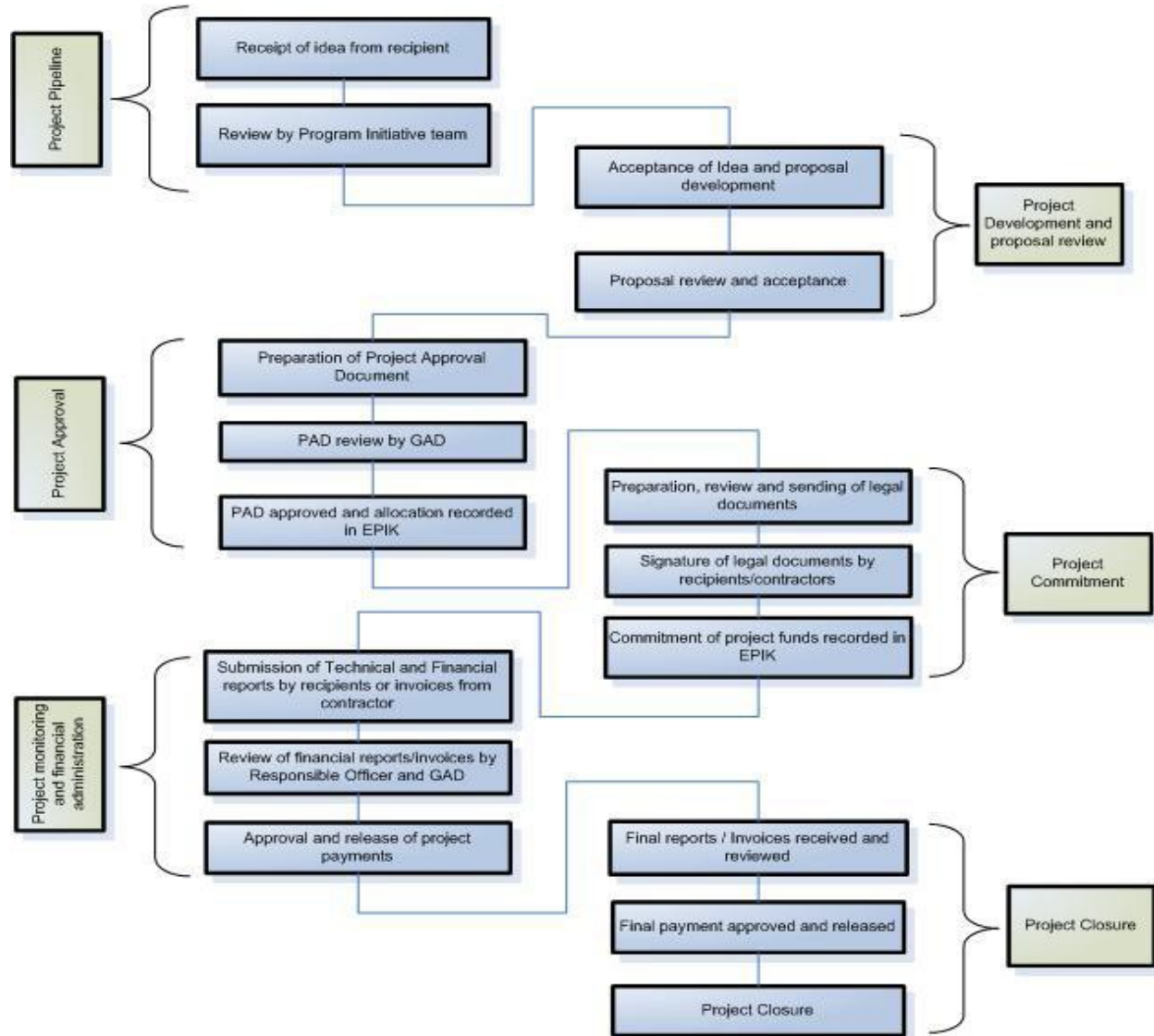
The Grant Administration Division (GAD) ensures the stewardship of IDRC resources and facilitates the implementation of projects throughout their lifecycle, which includes all stages from planning through pre-approval, approval, commitment, monitoring, and closure. The division also provides Centre-wide coordination of all aspects of grant administration; undertakes front-line grant administration; and ensures that all Centre staff use consistent grant administration practices.

Grant Administration Procedures (GAPs) are written to facilitate the stewardship responsibility. IDRC funds innovative research activities by providing grants that are documented internally and approved as projects. Projects fall under different categories (research projects, support initiatives, and direct awards) and three (3) different Program areas. Prior to the award of grants, IDRC selects projects using one of two basic project identification methods: unsolicited proposals (received randomly or prompted informally through contacts and monitoring of existing projects) or solicited proposals (either through open or on-invitation calls for research proposals, creation of research consortia, contribution to existing international research programs, etc.). Information on the administration of grants is also made available to IDRC Recipients through idrc.ca.

The following three figures provide pictorial descriptions of the Grants and Projects process:

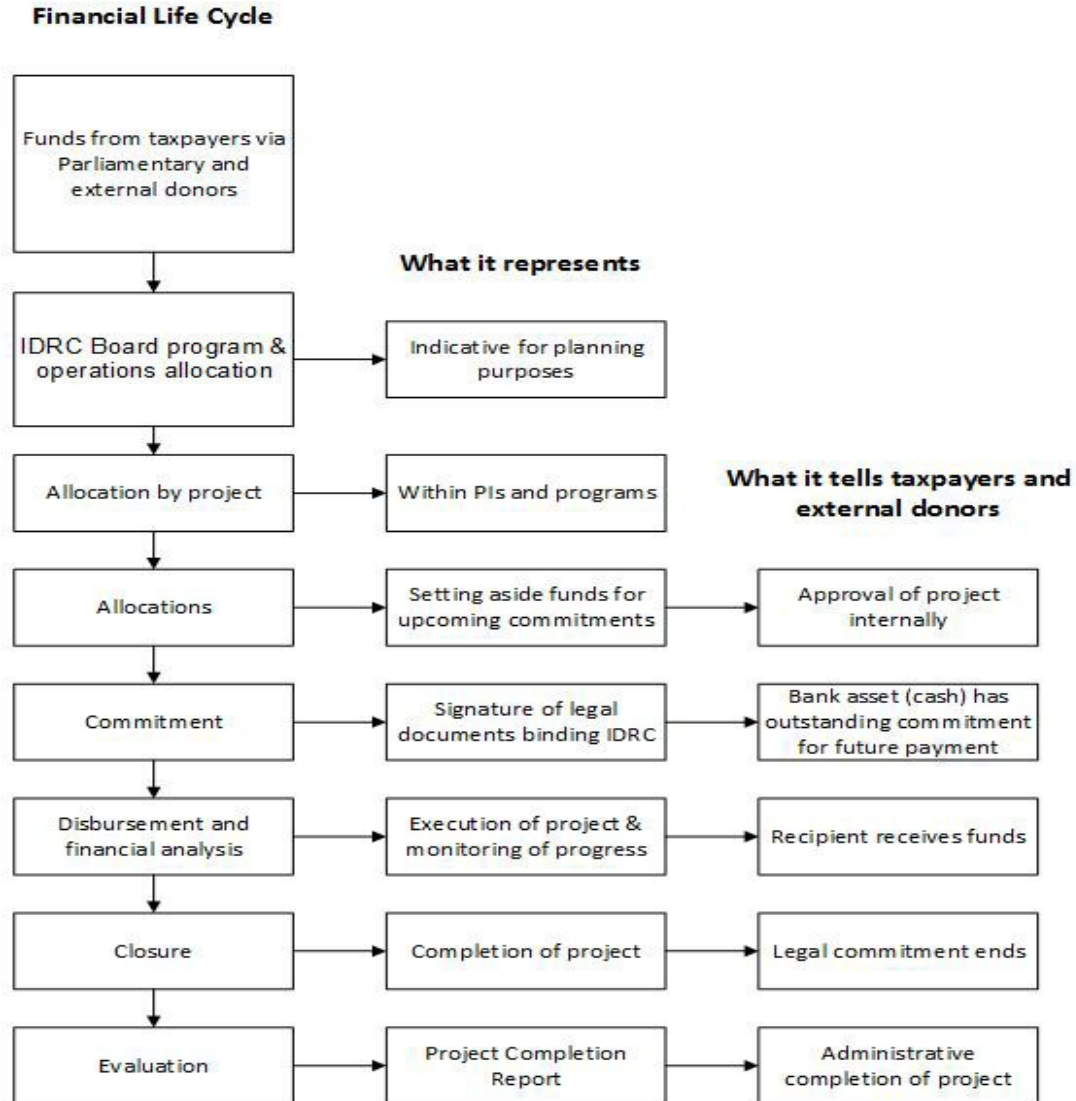
Project Life Cycle

The design of the GAPs flows from the life cycle of a project. Figure 2.1 provides a general overview of IDRC's project life cycle.



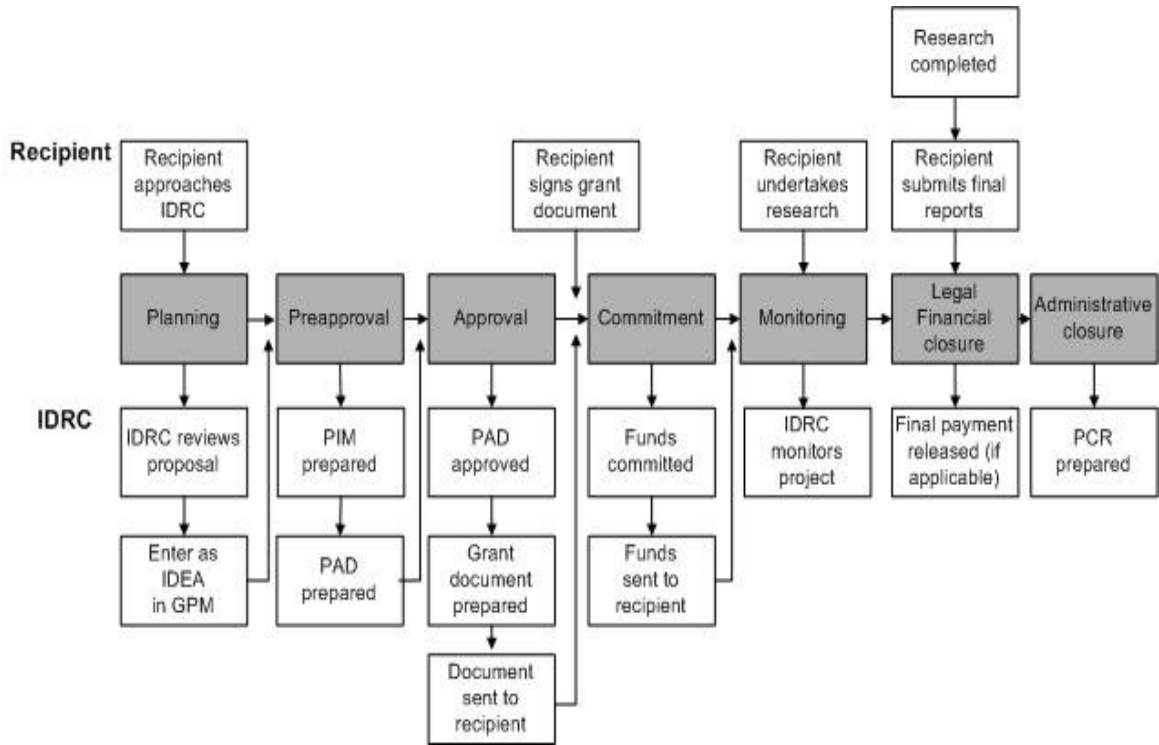
Management of Program Funds

Figure 2.2 provides an overview of how IDRC manages its program funds.



Relationship between IDRC and its Recipients

The following figure provides an overview of the relationship between IDRC and its recipients.



2.3.1 Acronyms

- Grant Administration Division (“GAD”)
- Grant Administration Procedures (“GAPs”)
- Project Approval Document (“PAD”)
- Project Information Memorandum (“PIM”)
- Project Completion Report (“PCR”)

IDRC Information Technology (IT) Environment

IDRC’s IT environment spans four regional offices (Nairobi, New Delhi, Cairo and Montevideo) and its head office in Ottawa. The regional offices have an average of 30 users with an average WAN link of 4 Mbps and latency of 180ms to 350ms.

IT Service Management

IDRC employs IT service management processes and procedures based on the best practices defined by Information Technology Infrastructure Library (ITIL).

Workstations

IDRC's employee workstation environment encompasses approximately 575 devices which consist of both desktop, notebook computers and tablets and are located across the world

The following is a software baseline which is applicable to all IDRC workstations:

- Microsoft Windows 7/SP1
- Internet Explorer 10
- Adobe Reader 11
- Java
- McAfee Anti-Virus
- Microsoft Outlook 2013 Email client
- Microsoft Office 2013 (Word, Excel, PowerPoint)

All IDRC workstations participate in a single Active Directory with domain controllers located in each office. File and print services are also located in each office. Email is located centrally in the Ottawa data centre.

Architecture Environment

IDRC's existing environment utilizes a number of Microsoft technologies including several SharePoint (2013) instances, an Exchange (2013) e-mail server, many recent versions of Windows Server (Windows Server 2012R2) and SQL Server (MS-SQL 2012) and Active Directory for system and network authentication. For external authentication of outside service an ADFS service has been implemented.

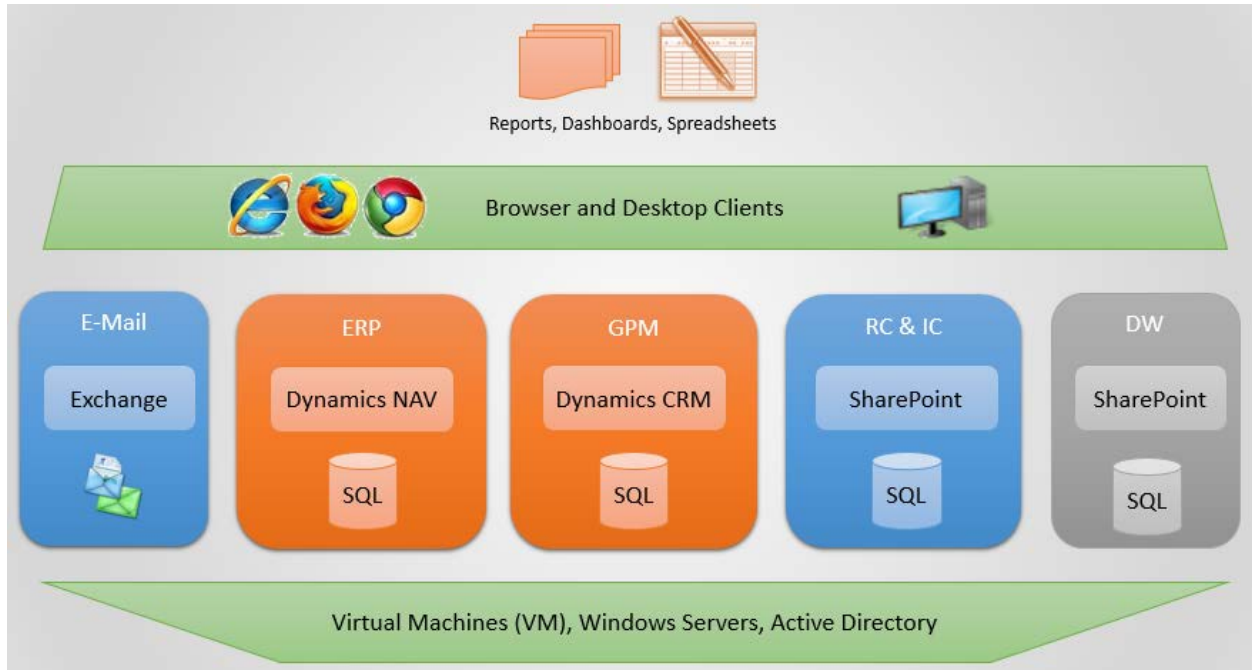
The Ottawa data center has standardized on VMware virtual machines and HP server hardware (standard server platform is an HP DL380 G9) and HP SAN. Network infrastructure includes Cisco Switches, routers and Firewall/VPNs and VoIP as well as Riverbed accelerators in all offices.

There is substantial use of and experience with SharePoint for Internal Collaboration (IC) intranet/extranet and records management is based on Gimmel Records Management Governance Suite which runs on SharePoint Records Centre (RC). A current Oracle-based data warehouse (DW) will be re-hosted on MS SQL and (likely) accessed through SharePoint.

The sister ERP project is about the introduction of Dynamics NAV and the GPM project will see the introduction of Dynamics CRM, both based on MS SQL Servers (2012). As indicated elsewhere desktops are standardized on Windows 7 and Microsoft Office Suite (2013). It is expected most of the existing Crystal Reports (SAP Business Objects) would be re-implemented by native reporting in the new applications.

Most systems reside in the Ottawa data center and Microsoft One Drive for Business is also used.

The following summarizes the current and expected architecture environment.



GPM Users by Location and Type

There are currently approximately 200 users on GPM distributed as indicated in the table below. It is expected that these numbers will most likely increase as more program staff become users of the system. The following numbers are intended to give the Proponent insight into the current user profile.

User Type	Number of Users	Description
Power Users	50	Interaction with financial system, approvals, commitments, payment processing, etc.
Light Users	80	Feed data to the system only
Read-only	70	Viewership only

2.4 DESCRIPTION AND SCOPE OF WORK

2.4.1 Project Scope

The Successful Proponent is expected to become fully aware and knowledgeable of IDRC’s grant making and project management processes.

Configuration

The Successful Proponent will configure Microsoft Dynamics CRM to address the following requirements which describe the essential processes that support the grant management function of the Centre’s business. The initial phase of the project will involve examining the various grant management processes to determine where simplification or streamlining might improve efficiency and with attention to where implementation on MS Dynamics CRM may face

challenges. In the latter instance the priority focus should be on adapting processes to fit within Dynamics CRM configuration parameters as opposed to extending or customizing the solution to meet a unique IDRC need. It is expected that the selected Proponent will have the technical and business analytical skills and proven experience to meet these requirements.

Additional design and configuration information will be determined during implementation.

Project Funding and Lifecycle Management

1. IDRC projects involve a multi-level work breakdown structure. A project may involve one or more Components where each component pertains to a unique grantee/institution
2. Project/Component data includes, but is not limited to, appraisal, abstract, objectives, contract tracking, milestones, payments, key dates, and contact information on project officers, other grantee/institution staff and project participants
3. Project budgeting involves two-stage encumbrance accounting involving an initial appropriation (allocation) from a funding pool at the project level and a subsequent commitment of funds at the component level, based on fiscal periods where actual expenses are reconciled
4. Supplements, extensions and reallocation of funds between components of a same project occur during the life of the project and the solution must accommodate associated adjustments.
5. Geographic coding and percentage attribution descriptors are required for reporting needs and should include the area where the research was performed; the region of impact; and the designated regional office. The descriptor codes represent global, regional, country, and possibly sub-country locations
6. Multiple funding sources can be attributed to each project. Funds can be internal (which refers to regular government funding through the Centre's Parliamentary allocation), external (which pertains to donor provided funding) or from an Externally Funded Program (which is a mix of internal and external funds, bundled together for a program with fixed ratios by agreed upon program themes and funding conditions/stages and which can be split unevenly between projects and project components)
7. The solution must include Donor Fund management capabilities, including the administration of donor agreements - the contracts that govern our management of external funds received for co-funded projects/programs over their life cycle. This involves capturing tombstone data on the project/program, recording funds committed and received, and financial and technical reporting milestones. While some of the Donor Fund management capabilities can be configured within Dynamics CRM, all financial

transactions will need to be integrated within Dynamics NAV. Invoicing donors is expected to be done through the accounts receivable module in Dynamics NAV. It is essential that institutional information regarding donors be maintained in one place to ensure an authoritative data source. The proponent will therefore be required to work on a global solution with IDRC and the successful proponent of RFP 15160007 – ERP Financials.

8. It is required to be able to track parallel funds in order to monitor but not necessarily manage co-sponsored initiatives
9. There are two distinct processes for managing the Recipient Administered portion (RAP) and the Centre Administered portion (CAP) of a project
10. A non-essential but desirable requirement would be the ability to provide budget forecasting and “what-if” scenarios

Grantee/Institution Management

11. There is a critical need for maintaining comprehensive information about each grantee/institution including standard information like Legal Name, Address, Legal status, etc., and fields to facilitate risk assessment, historical notes, multiple offices, contact names, institutional visits, etc.

Program Management

12. Reporting must reflect the fact that projects are categorized within the context of defined Programs which, in turn, can be rolled up into Program Areas (superset). Projects may also need to be grouped (tagged) on an ad hoc basis for special administration.
13. The solution must provide the ability to manage budget at the program and program area levels and commit from this budget to fund projects.
14. Programs coding and percentage attribution should support themes and outcomes.

Administrative, Technical and security

15. The solution will be integrated with the Financial System NAV (GL, AP, AR, PO, etc.) in order to recognize project allocations and commitments in the GL as well as to streamline grants payment processing (see Annex F – Integration).

16. While financial recording is exclusively single currency (\$Canadian) there is a need to track the currency used by the recipient and any required currency conversion.
17. System standard and User generated tabular reports and basic graphs for users to manage their portfolio of projects (from a technical and financial point of view, depending on user) and present information in different format and based on different needs such as funding, payments, region of impact, type of grantees, etc.
18. To improve on reporting capabilities there is a need to incorporate business Intelligence technology to enable basic dashboard displays and user configurable graphs
19. The solution must be capable of handling multiple user access roles taking into account position/role responsibilities and separation of duties (i.e. clearly defined role-based access controls/RBAC)
20. The solution must be capable of connecting with other applications operated by IDRC (e.g. web service API, SharePoint, Microsoft Office Suite)
21. The solution must integrate with IDRC's SharePoint based content management system (CMS) for documents (both reports and legal) or URL links to designated CMS content
22. There is a requirement for a flexible means to export data in various formats (Excel/CSV, XML, IATI) for further analysis
23. It is essential that business processes be automated through workflows to support paperless operations. As well the system should be facilitating and flexible so that people may easily drive the system rather than the converse.
24. Processes must be supported through online help text to guide the novice or occasional user in their use of the solution
25. The solution should be implemented in a Robust, extensible framework that will minimize the need for technical adjustments during product upgrades and minimize ongoing maintenance costs.

Costs

26. The solution must be cost effective both in ongoing terms and with respect to initial configuration
27. Data migration is not a mandatory requirement. However, if the systems integrator has migration tool and strategies that are cost effective the Centre would be interested in exploring this aspect.

2.4.2 Implementation Requirements

The Successful Proponent will be required to perform the following activities:

1. **Gap Analysis**
2. **Solution Design and Preparation**
3. **Configuration, Testing and Implementation**
4. **Initial Data Migration**
5. **Data Security**
6. **Project Management**
7. **Training and Communication**
8. **Transition and Post Implementation Support**
9. **System Documentation**
10. **Service Level Agreement**
11. **Resource Requirements**

The specific activity descriptions are detailed below.

1. GAP Analysis

- a) The Successful Proponent will assess IDRC's current GPM business processes (fairly well documented) and the native capabilities of Dynamics CRM and available accelerators related to grant making and research project management and develop an optimal approach to implementing best practices through appropriate CRM configuration while minimizing the need for customization.

2. Solution Design and Preparation

General Considerations

- a) The Successful Proponent will be responsible for providing knowledge transfer to IDRC's resources. The Successful Proponent shall propose a plan that clearly demonstrates how these users will be trained throughout the project, not just at the end. It is expected that at least one resource from the Successful Proponent's project team will be involved through every stage (e.g. configure, test and support) to ensure IDRC's resources are fully trained by project completion. The intent of the knowledge transfer is to enable IDRC employees to fully use, maintain and support the new functionality.
- b) The Successful Proponent will provide advice and guidance on innovative approaches to meet IDRC's requirements.
- c) As an early deliverable in the implementation, the Successful Proponent will conduct a forward looking evaluation of an on-premises versus "cloud" approach for the Dynamics CRM implementation.

- d) The Successful Proponent would provide system specifications for the chosen implementation environment. On-premises would be based on VMware and IDRC would provide the hardware. Either on-premises or Cloud (if that were to be pursued) would include specifications for CPU, memory, disk capacity and IOPS, network bandwidth and latency, and security considerations (such as IP restrictions and encrypted connections). The number of environments would also be indicated, such as development, acceptance testing, training, and production. Single sign-on and integration with IDRC's Active Directory directly or via ADFS or similar mechanism is a requirement.

3. Configuration, Testing and Implementation

- a) The Successful Proponent is expected to configure and test a fully functional end solution that integrates seamlessly with the ERP system. This requires the Successful Proponent to develop the full implementation strategy.
- b) The Successful Proponent shall develop and follow a testing and implementation schedule that rolls-out the solutions in a logical sequence, takes into consideration organization change impacts and which is approved in writing by IDRC.
- c) The Successful Proponent shall be responsible for user acceptance testing strategies in collaboration with the IDRC project team.
- d) The Successful Proponent shall be responsible for coordinating and managing all aspects of the system and user acceptance tests.
- e) IDRC employees shall conduct the user acceptance tests based on the plans and scripts developed by IDRC and the Successful Proponent.
- f) The Successful Proponent will help IDRC re-implement about 60 legacy reports within the native capabilities of the new application
- g) IDRC'S Project Authority is responsible for the ultimate acceptance of the solution.
- h) The Successful Proponent shall maintain a test record log, which includes test results and actions taken to resolve issues.
- i) Throughout the engagement the Successful Proponent shall be required to work with IDRC to modify develop and document business processes, procedures and system documentation that will be used to train IDRC end-users and the IDRC resources responsible for supporting the solution.

4. Initial Data Migration

4.1 Data Migration / Conversion

- a) The Successful Proponent shall be responsible for gathering the information about the current software and hardware aspects and define the most efficient way for migration in order to map IDRC data with their system.
- b) The integrity of the data will be the responsibility of IDRC who will decide what data will be migrated. Data to be migrated will be limited to opening balances in the chart of the accounts and some reference information.
- c) IDRC expects that the Successful Proponent will provide a list of data requirements and mechanism to capture the required data elements.
- d) IDRC will work with the Successful Proponent to populate the data using the tools and methods proposed.
- e) When the data is prepared, IDRC will hand it off to the Successful Proponent for import.
- f) The Successful Proponent will be responsible for the final post-migration report confirming the data was migrated successfully into the new system and confirm the quality and integrity of the data was not affected.

5. Data Security

- a) IDRC's type of data is Protected B which means the data must be kept confidential and not be provided outside the Successful Proponent's organization without IDRC's written agreement.
- b) After the data migration is completed, all temporary data must be disposed of in a secure manner and a certificate provided to IDRC attesting to the disposal.
- c) Only necessary Successful Proponent staff with appropriate security clearances (Reliability status) have access to IDRC data.

6. Project Management

Successful Proponents are to submit a complete proven system implementation plan. It is the intent of IDRC to have a functional Grants and Project Management system and to go live on April 1, 2016, fully integrated with the financial system. The project plan is to provide sufficient information on how the Successful Proponent can accomplish successful delivery within IDRC time-frame.

The Legacy System must continue to function at normal capacity during system transition with no impact to IDRC staff. The Successful Proponent must clearly describe any IDRC dependencies for system installation and deployment. The Successful Proponent's primary Project Manager must be able to communicate fluently in English and it would be of benefit to have one team member with a working knowledge of conversational French.

- a) The Successful Proponent shall be required to provide qualified and experienced resources to manage the end-to-end implementation. The Successful Proponent's project management team will work directly with the IDRC Project Authority.
- b) The Successful Proponent shall be required to conduct the following project management activities at a minimum:
 - i. Develop overall implementation approach and align project management tools using Agile methodology with IDRC's Project Authority.
 - ii. Perform gap/fit analysis as the first deliverable.
 - iii. Conduct a forward looking evaluation of an on-premises versus "cloud" approach for the Dynamics CRM implementation as an overall planning objective within the context of the entire ERP replacement initiative.
 - iv. Develop a detailed project plan with specific deliverables and timelines which must be accepted in writing by the IDRC Project Authority and that can be monitored and tracked by the IDRC Project Authority.
 - v. Engage in effective cooperation to achieve integration with sister ERP (NAV) application.
 - vi. Provide bi-weekly project status reports to the IDRC Project Authority.
 - vii. Monitor and track issues, risks, and change requests.
 - viii. Ensure delivery of functional and technical requirements.
 - ix. Provide a single point of contact to IDRC's Project Authority.
 - x. Propose key milestones. These proposed key milestones will need to be accepted by the Project Authority.

7. Training and Communication

- a) The Successful Proponent shall provide "train the trainer" training to super-users, who will be able to deliver classroom training and respond to questions from the end-users. Ideally spoken communication would be available in both English and French.
- b) To provide this level of training the Successful Proponent is expected to:
 - i. Define a training plan and schedule for all stakeholders groups; and
 - ii. Deliver training to a set of super-users/trainers for each project; and
 - iii. Deliver initial training in Ottawa to all the end-users.
- c) The training plan must clearly demonstrate how audiences will obtain the necessary training to be fully functional with the new solution. The training plan must include a training pilot to assess the training to be provided. A schedule that is approved in writing by the Project Authority must accompany the plan and must show the completion of all training prior to the go-live date.
- d) The Successful Proponent shall be responsible for developing all training documentation. IDRC will work with the Successful Proponent during implementation to finalize the training strategy.

- e) The training materials are expected to be produced in a format that can be accessed by all IDRC employees and can be run and printed on the standard IDRC desktop configuration. The training materials are to be provided in English and if available in French also. Ideally this will be editable to allow for future process changes. Online Help, training materials and videos shall be available and editable by IDRC to accommodate future system and process changes.
- f) The Successful Proponent will provide necessary and relevant employee communication material supporting Change Management.
- g) The Successful Proponent will also prepare questions and answers for frequently asked questions (FAQs), based on their previous implementation experiences in similar organizations.

8. Transition and Post-Implementation Support

- a) The Successful Proponent will be responsible for thoroughly documenting all complex implementation points, issues and workarounds. This includes an inventory of key reports supporting processes and any necessary training required for IDRC IT resources.
- b) The Successful Proponent will be responsible for transitioning the IDRC staff to fully take over ERP maintenance and support with training and documentation.
- c) The Successful Proponent is expected to demonstrate to the satisfaction of IDRC that the solution has been properly implemented and is fully functional when implementation is completed.
- d) The Successful Proponent will be responsible for meeting with the IDRC project team for a post-implementation review, including review of outstanding issues, actions and/or requirements.
- e) The Successful Proponent is expected to resolve any outstanding issues, problems, or work orders no later than 60 days after go-live.

9. System Documentation

All appropriate system documentation must be provided to the Centre. System documentation must be available in English and optionally available in French as well. In addition, all software required to operate the Solution must be supplied to the Centre with complete documentation and accompanying software-operating licenses.

Types of system documentation to be provided include at minimum:

- System Maintenance (Hardware and Software);
- System Installation (as built).

10. Service Level Agreement

The Successful Proponents is to propose service level agreements for on-site support of the Solution in the event of system failure. The Service Level Agreement must include at least:

- Level of service and support;
- Support options;
- Guaranteed level of system performance as it relates to uptime or downtime;
- Software warranty;
- Hours of support;
- Contact Information and escalation path;
- Detailed indication of support provisions and possible licensing implications associated with any 3rd party add-ons/plugin that may be incorporated into the solution

11. Resource Requirements

It is expected that the Successful Proponent will provide a team of qualified resources to meet the requirements and the timelines of this project.

2.4.3 Project Facts and Assumptions

As described in Section 1.2, IDRC has issued a separate solicitation for ERP Financial System (RFP # 15160007). While the implementation for the new GPM system and the ERP Financial System will be treated as two separate projects there are dependencies that the Successful Proponent should consider. IDRC expects the following timeline for both projects:

Activity	Date
NAV and CRM System Implementation Starts	Five working days after signature of contract
Meet with CRM contractor for launch meetings with IDRC Project Team members	September 2015
"Go Live" both systems	April 1, 2016

2.4.3.1 Modifications and Additional Phases of Work

Notwithstanding any Contract award based on the requirements and specifications set out herein, IDRC may add to the resulting Contract, additional goods and services, including, but not limited

to, future features, amendments, modifications, and related products and services as it may require and on such terms as the parties may agree upon.

2.5 IDRC RESPONSIBILITIES, SUPPORT, AND REPRESENTATIVES

IDRC will identify a **Project Authority** to whom the Successful Proponent will report during the period of a resulting Contract. The Project Authority will be responsible for coordinating the overall delivery of service, providing as required direction and guidance to the Successful Proponent, monitoring Successful Proponent performance and accepting and approving Successful Proponent deliverables on behalf of IDRC. Should any report, document, good or service not be in accordance with the requirements of the Statement of Work and to the satisfaction of the Project Authority, as submitted, the Project Authority shall have the right to reject it or require its correction at the sole expense of the Successful Proponent before recommending payment.

The Project Authority will ensure that appropriate subject matter experts from within IDRC are available to the Successful Proponent to discuss and provide content material as required.

IDRC will identify a **Contracting Authority**, who will oversee a resulting Contract throughout its lifecycle, in conjunction with the Project Authority and the Successful Proponent, create amendments for any changes to a resulting Contract, answer questions on terms and conditions, and manage the receipt and payment of invoices.

2.6 LOCATION OF WORK AND TRAVEL

The Successful Proponent may be required to participate in meetings with IDRC in Ottawa either by videoconference, teleconference or in person. For onsite work, IDRC will provide the necessary workstation and access to conduct all work. All travel costs and living expenses are the responsibility of the Successful Proponent.

2.7 LANGUAGE OF WORK

IDRC is under an obligation to respect the spirit and letter of the Official Languages Act.

The Project Team must be able to communicate fluently in English and would be considered an asset to have a working knowledge of conversational French. All documentation must be produced in English and if available in French.

SECTION 3 – PROPOSAL EVALUATION

This section describes the process that IDRC will use to evaluate Proposals and select a Successful Proponent.

3.1 EVALUATION COMMUNICATION

During Proposal evaluations, IDRC reserves the right to contact or meet with any individual Proponent in order to obtain clarification of its submission or to gain insight into the quality and scope of relevant services. Proponents will not be allowed to add, change or delete any information during the process. IDRC is in no way obligated to meet with any or all Proponents for this purpose.

3.2 EVALUATION METHODOLOGY

The following methodology will be used to evaluate Proposals:

3.2.1 Mandatory Requirements

Each Proposal will first be examined to determine compliance with each **mandatory** requirement identified in this RFP. A mandatory requirement is a minimum standard that a proposal must meet in order to be considered for further evaluation. Mandatory is defined as having substantial compliance as assessed by IDRC in its sole and absolute discretion.

A **Mandatory Requirements Checklist**, which summarizes the mandatory requirements set out in the RFP to assist in ensuring Proponents comply with all mandatory criteria, is located at Annex A.

Important Note: Proposals which fail, in the sole discretion of IDRC, to meet any mandatory requirement will be eliminated from further consideration in the evaluation process.

3.2.2 Rated Requirements

Responses that have met all the mandatory requirements will then proceed to the **rated** requirements evaluation. **Rated** requirements will be evaluated according to the degree to which they meet or exceed IDRC's requirements.

A **Rated Requirements Checklist**, which summarizes the rated requirements highlighted in Statement of Work, is located at Annex B.

3.2.3 Financials

Financial Proposals will be scored based on a relative pricing formula. Each Proponent will receive a percentage of the total possible points arrived at by dividing that Proponent's total price by the lowest submitted total price. For example, if the lowest total price is \$120.00, that Proponent receives 100% of the possible points ($120/120 = 100\%$), a Proponent who submits \$150.00 receives 80% of the possible points ($120/150 = 80\%$), and a Proponent who submits \$240.00 receives 50% of the possible points ($120/240 = 50\%$).

3.2.4 Presentations/Shortlist

From the compliant proposals, IDRC may elect to shortlist a maximum of three (3) Proponents based on the highest scores for the rated requirements and financials.

Shortlisted Proponents may be asked to prepare a presentation, provide a demonstration of its hosted application, or provide additional information prior to the final selection. IDRC reserves the right to supply more information to those Proponents who are shortlisted.

3.2.4. Final Score

Total points will be calculated and IDRC may select the Lead Proposal or Proposals achieving the highest total points, subject to IDRC's reserved rights.

3.3 EVALUATION TABLE

IDRC will evaluate Proponent's proposals based on the following:

Section	Requirement	Weighting
Throughout the RFP and Annex A	Mandatory Requirements (<i>If Pass, proceed with evaluation process</i>)	Pass or Fail

Section	Requirement	Weighting
Technical: Annex B	Corporate Experience	5
	Experience of Project Team	10
	Understanding of the Requirements	15
"	Implementation Plan and Approach	30
"	Approach to Business Requirements	10
	Total Technical Bid	70% (70% pass)
Financial: Annex C	Total pricing, exclusive of taxes	30%
	Total %	100

3.4 PROPONENT FINANCIAL CAPACITY

IDRC reserves the right to conduct an assessment of the Proponent's financial capacity. IDRC may request that the Successful Proponent provide proof of financial stability via bank references, financial statements, or other similar evidence. The Successful Proponent must provide this information upon 72 hours of IDRC's request. Failure to comply may result in disqualification.

3.5 SUCCESSFUL PROPONENT SELECTION

As noted in section 5.8, acceptance of a proposal does not oblige IDRC to incorporate any or all of the accepted proposal into a contractual agreement, but rather demonstrates a willingness on the part of IDRC to enter into negotiations for the purpose of arriving at a satisfactory contractual arrangement with one or more parties.

Without changing the intent of this RFP or the Successful Proponent's proposal, IDRC will enter into discussions with the Lead Successful Proponent for the purpose of finalizing the Contract. In the event no satisfactory Contract can be negotiated between the Successful Proponent and IDRC, IDRC may

terminate negotiations. In such event, if IDRC feels that the Proponent with the second highest score may meet the requirements, IDRC will continue the process with the secondary Successful Proponent, and so on.

Announcement of the Successful Proponent will be made to all Proponents who have provided a submission *via email* from the Contracting Authority following the signing of a Contract.

SECTION 4 – PROPOSAL FORMAT

Proposal responses should be organized and submitted in accordance with the instructions in this section.

4.1 GENERAL

Proposals should be in 8 1/2" x 11" (letter) format, with each page numbered. Elaborate or unnecessary voluminous proposals are not desired. The font used should be easy to read and generally be no smaller than 11 points (smaller font can be used for short footnotes).

4.2 ORGANIZATION OF RESPONSES

Responses should be organized as follows, where the sections that follow provide more details:

see RFP Section for full details	File	Contents
4.4	1.0	Cover Letter
4.5	1.0	Technical Proposal
4.6	2.0	Financial Proposal

4.3 COVER LETTER

A one (1) page covering letter on the Proponent's letterhead should be submitted and should include the following:

- a. A reference to the RFP number and RFP title.
- b. The primary contact person with respect to this RFP: the individual's name, address, phone number and email address.
- c. A statement confirming the validity of the proposal (refer to section 5.4).
- d. A statement confirming the Proponent does not have a conflict of interest with this RFP, real or perceived (refer to section 5.7).
- e. The letter **signed** by person(s) duly authorized to sign on behalf of the Proponent and bind the Proponent to statements made in response to the RFP.

4.4 TECHNICAL PROPOSAL

4.4.1 Table of Contents

The Proponent should include a table of contents that contains page numbers for easy reference by the evaluation committee.

4.4.2 Response to the Statement of Work

The Proponent **must** provide detailed information relative to each requirement listed in the Statement of Work, for both Mandatory and Rated Requirements, and clearly outline the work that the Proponent proposes to undertake for the provision of these services to IDRC.

When responding, the Proponent **must** complete the response grids found in **Annex A- Mandatory Requirements Checklist** and **Annex B- Rated Requirement Checklist**. (A MS Word version is available upon request to the Contracting Authority listed on the cover page of this document.)

Except where specifically noted in the evaluation criteria, the Proponent must base all responses on an on premise solution.

4.5 FINANCIAL PROPOSAL

4.5.1 General

The Proponent should provide a *separate* response relative to the pricing of its proposed solution (reference section **5.3.2**).

4.5.2 Pricing Requirements

The Proponent **must** provide pricing for all of its proposed Services. When responding, the Proponent must complete the response grid in **Annex C-Pricing Requirements Checklist**. (A MS Word version is available upon request to the Contracting Authority listed on the cover page of this document.)

The Proponent must provide pricing based on an on premise solution. Only on premise pricing will be evaluated as the Proponents bid price.

4.5.3 Mathematical Errors

If there are errors in the mathematical extension of unit price items, the unit prices prevail and the unit price extension is adjusted accordingly.

If there are errors in the addition of lump sum prices or unit price extensions, the total is corrected, and the correct amount reflected in the total price.

Any Proponent affected by mathematical errors shall be notified by IDRC and be given the corrected prices.

All other conditions regarding pricing are found in Annex C.

SECTION 5 – CONDITIONS

The purpose of this section is to inform the Proponent about IDRC's procedures and rules pertaining to the RFP process.

5.1 ENQUIRIES

All matters pertaining to this RFP are to be referred exclusively to the Contracting Authority named on page 1.

No verbal enquiries or verbal requests for clarifications will be accepted.

Proponents should, as much as feasible, aggregate enquiries and requests for clarifications and shall submit them **in writing via email** to the **Contracting Authority** by Sunday, June 21, 2015, at 11:59 p.m. EDT in order to receive a response prior to the close date. When submitting, Proponents *email subject line* should cite "**RFP # 15160008**, Development, Configuration and Implementation Services- Microsoft Dynamics CRM".

The Contracting Authority will provide **all answers to significant enquiries** received on without revealing the sources of the enquiries.

In the event that it becomes necessary to revise any part of the RFP as a result of any enquiry or for any other reason, **an Amendment** to this RFP will be issued.

5.2 SUBMISSION DEADLINE

IDRC will only accept proposals up to the close date and time indicated on the cover page.

Important note: Late proposals will not be accepted. No adjustments to proposals will be considered after the close date and time.

5.3 PROPOSAL SUBMISSION INSTRUCTIONS

Proposals should be submitted in accordance with the instructions in this section.

5.3.1 Method of Sending

Proposal submission is electronic, via **email**, in **Microsoft Word** or in **PDF** format to the Contracting Authority named on page 1. When submitting, Proponents *email subject line* should cite "**For Submission RFP # 15160008** Development, Configuration and Implementation Services- Microsoft Dynamics CRM".

Important Note: Email messages with large attachments can be slowed down in servers between the Proponent's email and the Contracting Authority's email inbox. It is the Proponent's responsibility to ensure that large emails are sent sufficiently in advance to be at IDRC by the close date and time. Proponents should use electronic receipt confirmation and or contact the Contracting Authority to confirm receipt.

Important Note: The maximum size of an email that IDRC can receive is **10MB**. If necessary, Proponents can send multiple emails.

5.3.2 Number of Copies

Electronic submission should consist of **two (2) files**: one (1) for the cover letter and technical proposal, and one (1) for the financial proposal.

5.3.3 Changes to Submission

Changes to the submitted proposal can be made, if required, provided they are received as an Addendum (or an Amendment) to, or clarification of, previously submitted proposal, or as a complete new proposal to cancel and supersede the earlier proposal. The addendum, clarification, or new proposal should be submitted as per the delivery instructions outlined above, be clearly marked **“REVISION”**, and **must be received no later than the submission deadline**. In addition, the revised proposal should include a description of the degree to which the contents are in substitution for the earlier proposal.

5.3.4 Multiple Proposals

Under RFP 15160008, IDRC will accept only one (1) proposal per Proponent.

5.4 VALIDITY OF PROPOSAL

Proposals must remain open for acceptance for **one hundred twenty (120) days** after the close date.

5.5 PROPONENTS COSTS

All costs and expenses incurred by a Proponent in any way related to the Proponent’s response to the RFP, including but not limited to any clarifications, interviews, presentations, subsequent proposals, review, selection or delays related thereto or occurring during the RFP process, are the sole responsibility of the Proponent and will not be chargeable in any way to IDRC.

5.6 GOVERNING LAWS

This RFP is issued pursuant to the laws of the province of Ontario and the laws of Canada.

5.7 CONFLICT OF INTEREST

In submitting a Proposal, the Proponent must avoid any real, apparent or potential conflict of interest and will declare to IDRC any such conflict of interest.

In the event that any real, apparent, or potential conflict of interest cannot be resolved to the satisfaction of IDRC, IDRC will have the right to immediately reject the Proponent from consideration and, if applicable, terminate any Contract entered into pursuant to this RFP.

5.8 RIGHTS OF IDRC

IDRC does not bind itself to accept any proposal submitted in response to this RFP, and may proceed as it, in its sole discretion, determines following receipt of proposals. IDRC reserves the right to accept any proposal(s) in whole or in part, or to discuss with any Proponents, different or additional terms to those envisioned in this RFP or in such a Proponent’s proposal.

After selection of preferred proposal(s), if any, IDRC has the right to negotiate with the preferred Proponent(s) and, as a part of that process, to negotiate changes, amendments or modifications to the proposal(s) at the exclusion of other Proponents.

Without limiting the foregoing, IDRC reserves the right to:

- a. seek clarification or verify any or all information provided by the Proponent with respect to this RFP, including, if applicable to this RFP, contacting the named reference contacts;
- b. modify, amend or revise any provision of the RFP or issue any addenda at any time; any modifications, amendment, revision or addendum will, however, be issued in writing and provided to all Proponents;
- c. reject or accept any or all proposals, in whole or in part, without prior negotiation;
- d. reject any proposal based on real or potential conflict of interest;
- e. if only one proposal is received, elect to accept or reject it;
- f. in its sole discretion, cancel the RFP process at any time, without award, noting that the lowest or any proposal will not necessarily be accepted;
- g. negotiate resulting Contract terms and conditions;
- h. cancel and/or re-issue the RFP at any time, without any liability whatsoever to any Proponent;
- i. award all or any part of the work to one or more Proponents based on quality, services, and price and any other selection criteria indicated herein; and
- j. retain all proposals submitted in response to this RFP.

ANNEX A – Mandatory Requirements Checklist

As stated in **Section 3.2.1 Mandatory Requirements**, to qualify as an eligible Proponent, you must meet all the following requirements.

As stated in in Section 4.4.2 Response to the Statement of Work, the Proponent must provide detailed information relative to each requirement. All references to bilingual refer to English and French.

All fee implications related to the responses must be identified in the financial proposal.

	Mandatory Requirement	Yes V	Response
Company and Proposed Resources Information			
A1.	Company Background Provides the following company information and qualifications: <ul style="list-style-type: none"> • Name of firm. • Brief history of your company, including year founded, corporate structure, head office, main locations, and affiliated companies and their relationships. • Indicate the number of clients that you have provided similar services to those listed in this RFP. • Indicate the number of Canadian public sector (Federal, including Crown Corporations and Agencies) clients you have. • Silver or Gold Level of Microsoft certification 	<input type="checkbox"/>	
A2.	Client References for Projects Provides three (3) client references for similar projects in size and complexity that were implemented in Canada within the last five (5) years where reference information shall include: <ul style="list-style-type: none"> • Client name, telephone number, and email address. • A brief description of the project. 	<input type="checkbox"/>	
A3.	Client References for Project Resources	<input type="checkbox"/>	

	Mandatory Requirement	Yes V	Response
	<p>The Proponent’s response should demonstrate the quality and level of expertise of its proposed team by providing the following:</p> <p>Two (2) client references for each proposed project resource for whom similar services have been done within the past two (2) years from the RFP closing date. This shall include: company name, client contact name, contact title, contact telephone number, email address, services period, and brief description of services provided.</p> <p>*IDRC reserves the right to contact these references. IDRC cannot be used as a reference towards this RFP.</p>		
A4.	<p>Physical Architecture document Provide an architectural plan clearly outlining:</p> <ul style="list-style-type: none"> • Software required for the execution of the solution (ex: Server OS, DB software, etc.), • Server specification (memory, CPU), • Disk space requirement, • Special security requirements (ex: local firewall rules, certificate requirements) • Describe audit trail / logging features that capture evidence of authorized and unauthorized program changes to the operating system and database. 	<input type="checkbox"/>	
A5.	<p>Project Plan Provides a High-Level Project Plan with key milestones in accordance with section 2.4.3 Project Facts and Assumptions and dependencies to meet April 1, 2016 go-live date including integration with the ERP.</p>	<input type="checkbox"/>	

	Mandatory Requirement	Yes V	Response
A6.	<p>IT Security Provides the following IT security control documentation to confirm the IT security control capacity of the Proponent is satisfactory to IDRC:</p> <ul style="list-style-type: none"> a) Documentation or certification confirming how the Proponent has implemented security controls specified in one (1) of the following security guidelines: ISO 27001, ITSG-33 or equivalent for a Protected B, Medium, Medium (PBMM) environment. Include details on how the Proponent will advise IDRC of any changes. b) Assurances that the Proponent will inform IDRC in writing, in a reasonable timeframe (and confirm your standard timeframe) of security incidents that could affect IDRC data (i.e. compromised, lost or stolen data, software bug, etc.). A recent (within the last 2 years) a threat and risk assessment (TRA) or certification indicating a TRA has been conducted by a third party on the technology/infrastructure. The TRA or certification must indicate the overall threat and risk status. 	<input type="checkbox"/>	
A7.	<p>Privacy Provides copies of Privacy Policy (ies) that addresses all requirements as it relates to the protection of personal information as required in the Statement of Work.</p>	<input type="checkbox"/>	
A8.	<p>Reliability Status Confirms for Proponent's employees that Reliability security status clearances are obtained for access to client data that includes sensitive personal information.</p>	<input type="checkbox"/>	
A9.	<p>Data Access Provides a description of the processes in place to ensure that only Proponent's employees with a legitimate business purpose and clearance (Reliability status) will have access to IDRC data and how these processes are enforced.</p>	<input type="checkbox"/>	

	Mandatory Requirement	Yes V	Response
A10.	<p>Confidentiality Confirms complete confidentiality of all IDRC data entrusted to it by IDRC, including the protection of personal information.</p> <p>Describes methodology for ensuring the accuracy of personal information, and safeguards against the unintentional disclosure and exposure of IDRC personal information.</p>	<input type="checkbox"/>	
A11.	<p>Personal Information Confirms that processes and procedures exist to prevent the unintentional exposure of IDRC personal information.</p>	<input type="checkbox"/>	
A12.	<p>Data Confirms adherence to the requirement that all IDRC data will at all times remain the property of IDRC.</p> <p>Provides, on a minimum quarterly basis, a copy of all IDRC data in an agreed upon format.</p>		
A13.	<p>Migration Provides ability to migrate IDRC data to the new solution.</p>		
A14.	<p>Testing Provides a highly functional, secure testing environment/database, both pre and post implementation.</p>	<input type="checkbox"/>	
A15.	<p>Quality Control Maintains in place adequate quality control procedures to ensure reliability of information and results.</p>	<input type="checkbox"/>	

ANNEX B – Rated Requirements Checklist

As stated in **Section 3.2.2 Rated Requirements**, the following requirements will be evaluated according to the degree to which they meet or exceed IDRC's requirements.

As stated in **Section 4.4.2 Response to the Statement of Work**, the Proponent **must provide detailed information relative to each requirement**.

All references to bilingual refer to English and French.

All fee implications related to the responses must be identified in the financial proposal. In order to obtain technical points for their bid submission, Proponents must respond to the corresponding rated requirement by providing a description explaining, demonstrating, substantiating, or justifying their capability or approach to meet the requirement. Proponents' responses should be relevant, thorough, clear, and concise.

Proponents must respond based on an on premise solution.

Proponents' responses to the rated requirements will be evaluated and scored in accordance with the evaluation grid. Only bids that obtain the minimum pass mark of 70% will be considered responsive. In addition to any other obligations contained in the resulting contract, the Proponent has been awarded technical points and will be contractually obligated to provide all services described in any of its responses to this Annex, in accordance with and at the prices contained in the Proponent's Financial Proposal. Proponents that fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

Evaluation Ruler

The evaluation ruler will be used to evaluate the Proponent's response for all rated requirements unless otherwise detailed in the table.

The evaluation ruler will be applied based on the extent to which the Proponent's response corresponds to each requirement and the extent to which the Proponent applies the global depth factors within their response. Each of the global depth factors is given **equal consideration** in determining the overall rating.

Responses should identify any assumptions and/or constraints, and identify if the requirement is met with native NAV capability, add-on or customization, as appropriate. When customization work is required, an estimate of time and cost must be provided.

Global Depth Factors:

- Response demonstrates a clear understanding of the desired outcomes of the requirement, and knowledge of the required criteria/criterion;
- Response explains the complexity of the proposed solution and demonstrates ability to effectively meet the required criteria/criterion, substantiated by a detailed approach and/or supporting experience related to the requirement;
- Response considers the desire to have an innovative solution that provides value for money;
- Response is based on the application of business and management best practices; and

Response demonstrates risk avoidance, mitigation, and/or demonstrates how risk is not introduced.

EVALUATION RULER	
0	No information or the information provided demonstrates that the solution does not meet the requirement. Proponent receives 0% of the available points for this element.
20%	The information provided demonstrates a minimal understanding of the requirement and most of the depth factors are not addressed or have significant weaknesses. Proponent receives 20% of the available points for this element.
55%	The information provided demonstrates an understanding of the requirement and there are weaknesses in how some of the depth factors are addressed. Proponent receives 55% of the available points for this element.
70%	The information provided demonstrates a very good understanding of the requirement and most of the depth factors are addressed very well. Proponent receives 70% of the available points for this element.
100%	The information provided demonstrates an exceptional understanding of the requirement and all of the depth factors are addressed extremely well. Proponent receives 100% of the available points for this element.

	Rated Requirement	Response
	Corporate Experience – Weighting: 5%	
B1.	Similar Project Experience with Microsoft Dynamics CRM Provide a description of at least 3 projects of similar size and complexity	

	Rated Requirement	Response
	<p>where the Proponent has configured and implemented Microsoft Dynamics CRM for 100-300 active users over multi country platform.</p> <p>The referenced projects should be in use in a production environment, for at least one year prior to the bid solicitation closing date.</p> <p>In its rating, IDRC will consider the number of projects referenced and similar to the needs and size of the IDRC.</p> <p>Scores will be awarded as follows: 0-1 reference = 0% 2-3 reference = 1.5% > 3 references = 2.5%</p> <p>Maximum Points: 2.5%</p>	
B2.	<p>Experience in providing Microsoft Dynamics CRM configuration, implementation and services</p> <p>This criterion will evaluate the number of consecutive years of relevant experience, up to the date of bid closing, the Proponent has in providing Microsoft Dynamics CRM deployment, implementation and services.</p> <p>The Proponent should specify the number of consecutive years they have provided Microsoft Dynamics CRM implementation, configuration and services, and should provide the following information:</p> <ul style="list-style-type: none"> • A client history for the consecutive years of experience specified. This can be more than one client, but the years of experience must be consecutive. • The start and end dates for the provision of services for each client cited. 	

	Rated Requirement	Response
	<p>Proponents demonstrating at least 5 consecutive years of relevant experience will receive the maximum available points.</p> <p>Scores will be awarded as follows: < 2 years = 0% 3- 4 years =1.5% > 5 years = 2.5%</p> <p>Maximum Points: 2.5%</p>	
Experience of Project Team – Weighting 10%		
B3.	<p>Details of the Project Manager</p> <p>The proponent should provide the details of the project manager they are proposing to be a part of the implementation, deployment, and services:</p> <p>Provides Curriculum Vitae for the Project Manager and must clearly outline the number of years of relevant experience in managing ERP solution implementation projects, similar in both scope and functionality to the project described in the scope.</p> <p>Scores will be awarded based on the relevance of the qualifications detailed in the Curriculum Vitae. The Evaluation Ruler will be applied.</p> <p>Maximum Points: 5%</p>	
B4.	<p>Details of the Project Team</p> <p>The proponent should provide the details of the project team they are proposing to be a part of the implementation, deployment, and services:</p> <p>Provides Curriculum Vitae for each of the proposed implementation team resources.</p>	

	Rated Requirement	Response
	<p>Scores will be awarded based on the relevance of the qualifications detailed in each Curriculum Vitae. The Evaluation Ruler will be applied.</p> <p>Maximum Points: 5%</p>	
Understanding the Requirements – Weighting: 15%		
B5.	<p>Understanding Scope Describe your high level understanding of the scope of the project and how you might propose leveraging the native capabilities of MS Dynamics NAV to innovate IDRC’s processes.</p> <p>Score will be awarded using the Evaluation Ruler.</p> <p>Maximum Points: 5%</p>	
B6.	<p>Best Value Describe your ability to offer a solution that provides the best value to IDRC (i.e. a portal/workflow solution).</p> <p>Score will be awarded using the Evaluation Ruler.</p> <p>Maximum Points: 5%</p>	
B7.	<p>System Integration While Dynamics CRM will provide the basis for IDRC’s Grants and Project Management System, an application based on Dynamics NAV will be implemented to serve as IDRC’s Financial system. These two applications should be closely integrated.</p> <ul style="list-style-type: none"> a) Describe an approach to identifying key integration points and opportunities for transparent access or effective data synchronization. b) Indicate how the proponent would work with another team to achieve effective integration. 	

	Rated Requirement	Response
	<p>Score will be awarded using the Evaluation Ruler.</p> <p>Maximum Points: 5%</p>	
	<p>Implementation Plan and Approach - Weighting 30%</p>	
<p>B8.</p>	<p>On premise vs. Cloud Based Approach</p> <p>Indicate experience implementing an on premise solution, cloud solution or hybrid solution (Infrastructure as a Service, Software as a Service) for MS-Dynamics CRM including implications for ongoing maintenance and support.</p> <p>Describe the approach that would be taken to support a preferred method and why you may recommend one method versus another.</p> <p>Score will be awarded using the Evaluation Ruler.</p> <p>Maximum Points: 5%</p>	
<p>B9.</p>	<p>Project Plan</p> <p>Provide a project plan for on premise implementation highlighting the approach that the Proponent would take in performing the end-to-end implementation using Agile methodology. The response should consider the timelines and Phase 1 requirements listed in the RFP.</p> <p>The Proponents response should include as applicable:</p> <ul style="list-style-type: none"> a) A proposal for a project team structure, detailing required roles and time requirements for both the Proponent's resources and the IDRC resources. b) Approach to a fit/gap analysis c) Installation and initial setup of software applications 	

	Rated Requirement	Response
	<p>d) Systems environment setup, for development/testing and production, and how IDRC project staff would be able to access it</p> <p>e) Determination and initial configuration of key reference data and security assignments</p> <p>f) Approach to initial data population</p> <p>g) Workflow design and configuration</p> <p>h) Design and development of reports</p> <p>i) Approach to risk and issue management and testing</p> <p>j) Software application-level security design and configuration</p> <p>k) Approach and timelines to go-live cutover and early life support (ELS)</p> <p>l) Post go-live support. This is specific to the period after go-live and does not include long-term support and maintenance plans.</p> <p>Score will be awarded using the Evaluation Ruler.</p> <p>Maximum Points: 20%</p>	
B10.	<p>Training Describe your approach to training :</p> <p>a) Confirm training can be delivered in French and English.</p> <p>b) Provide a training plan and schedule for all stakeholder groups.</p> <p>c) Provide a sample of your training material.</p> <p>d) Describe the ‘train the trainer’ training and how it prepares super-users to respond to questions from the end-users.</p> <p>e) Provide a brief overview of the training for all categories of users (i.e. key system administrators, employees and managers).</p> <p>f) Confirm that all training documentation will be provided in English and if available in French, in an editable format (i.e. MS Word, PowerPoint) and/or online and will include:</p>	

	Rated Requirement	Response
	<ul style="list-style-type: none"> I. General reference material (i.e. system administrator and user guides, etc.); II. How to/quick steps; III. Frequently Asked Questions (FAQ), and Classroom training material which includes: presenter slides and supporting narrative, handouts, scripts to follow for delivering online demonstrations, and training environments for examples and exercises. <p>Score will be awarded using the Evaluation Ruler.</p> <p>Maximum Points: 2.5%</p>	
B11.	<p>Communication and Change Management</p> <p>While IDRC has a dedicated Communications and Change Management resource, describe a recommended communication and engagement strategy that would touch on key milestones and techniques, such as:</p> <ul style="list-style-type: none"> a) Overall timelines and themes b) Timing for Updates and News c) Post-implementation continuation of end-user engagement d) And other advisable <p>Score will be awarded using the Evaluation Ruler.</p> <p>Maximum Points: 2.5%</p>	
Business Requirements – Weighting: 10%		
B12.	<p>Business Analytical Skills of the team</p> <p>Describe your methods used to gather and document detailed requirements, and apply these requirements to the design of the software configuration, integration of the business rules, workflow, user interfaces and reports. Specifically:</p>	

	Rated Requirement	Response
	<p>a) Assessing IDRC's current processes. b) Refining and recommending process changes to facilitate configuration. c) Reducing or eliminating the need for customization</p> <p>Score will be awarded using the Evaluation Ruler.</p> <p>Maximum Points: 10%</p>	

ANNEX C – Pricing Requirements Checklist

Continuing from **Section 4.5.2 Pricing Requirements**, the following must be addressed in the Proponent’s financial proposal.

IDRC is interested in discussing performance bonuses with the Successful Proponent.

C1. BASIS OF PAYMENT

1.1 All prices are to be quoted in Canadian dollars (CAD) and be exclusive of the Goods and services Tax (GST) or Harmonized Sales Tax (HST). The GST or HST, whichever is applicable, shall be extra to the prices quoted by the Proponent and will be paid by IDRC.

1.2. Firm Ceiling License, Maintenance and Support Costs

1.2.1 *Implementation*: The Proponent is to provide pricing based on a time and materials basis for the Implementation Plan.

1.2.2 *Maintenance* Costs: The Proponent is to provide firm all-inclusive rates based on a three (3) year initial contract term.

1.2.3 The firm all-inclusive rates and/or prices shall include all labor, materials, photocopies, telephone charges, overhead, profit, travel, and all other costs associated with providing the Services outlined in the Statement of Work.

1.2.4 Any Proponent who is a non-resident of Canada for tax purposes shall clearly state this fact in its financial proposal; otherwise, the Proponent will be deemed to have represented and warranted that it is a resident of Canada for tax purposes.

1.2.5 IDRC may exercise its option to add additional users, at any time during the contract period or option period.

1.2.6 Proponent’s prices in Table C2.1 include the supply and delivery of the Licensed Software, User Licenses, including Warranty and Documentation, and as required to meet the functional requirements detailed in the Statement of Work.

1.2.8 The Proponent’s price in Table C2.3 must be inclusive of all software costs.

1.2.9 The Proponent’s price must be based on an on premise solution.

1.2.10 The Proponent’s price must accurately reflect the assumptions in their proposed project plan and the resources included in the technical bid.

1.2.11 Proponent’s price must be based on the priority modules outlined in the Statement of Work.

C2. TOTAL PROPOSAL PRICE - DETAILS

C2.1 Proposal Price – Implementation – Licenses

Price for licenses other than CRM.

Item	Description	Unit Price	Quantity	Extended Price
1				
2				
3				
4				
5				
	Total: A			A

C2.2 Proposal Price – Implementation – Services

Item	Resource Role	Per Diem Price	Estimated Days	Extended Price
	(Initial Implementation)			
1				
2				
3				
4				
5				
	Total B:			B

C2.3 Proposal Price - Maintenance

Annual maintenance of all licensed software – Dynamics NAV, third party, or custom – and other services. It is expected that all software installed and configured by the Proponent will come under a maintenance agreement.

Item	Maintenance Description	Annual Maintenance Price
1		
2		
3		

4		
	Total C:	C

C3. EVALUATED BID PRICE

Proponent’s Evaluated Bid Price is:

A + B + C = Evaluated Bid Price

C4. DIRECTIONAL PRICING FOR CLOUD SERVICES (OPTIONAL)

Proponents are requested to provide directional prices for (a) Infrastructure as a Service (b) Software as a Service. These prices are not part of the Evaluated Bid Price.

Infrastructure as a Service

To fully understand the Infrastructure as a Service offering proponents should provide a brief high level description of the SaaS architecture and how the components interact.

Item	Description (licenses and services)	Unit Price	Quantity	Extended Price
1				
2				
3				
4				
5				
	Total:			

Item	Resource Role	Per Diem Price	Estimated Days	Extended Price
	(Initial Implementation)			
1				
2				
3				
4				
5				
	Total:			

Item	Maintenance Description	Annual Price
1		

2		
3		
4		
	Total:	

Software as a Service

To fully understand the Software as a Service offering proponents should provide a brief high level description of the SaaS architecture and the how components interact.

Item	Description (licenses and services)	Unit Price	Quantity	Extended Price
1				
2				
3				
4				
5				
	Total:			

Item	Resource Role	Per Diem Price	Estimated Days	Extended Price
	(Initial Implementation)			
1				
2				
3				
4				
5				
	Total:			

Item	Maintenance Description	Annual Price
1		
2		
3		
4		
	Total:	

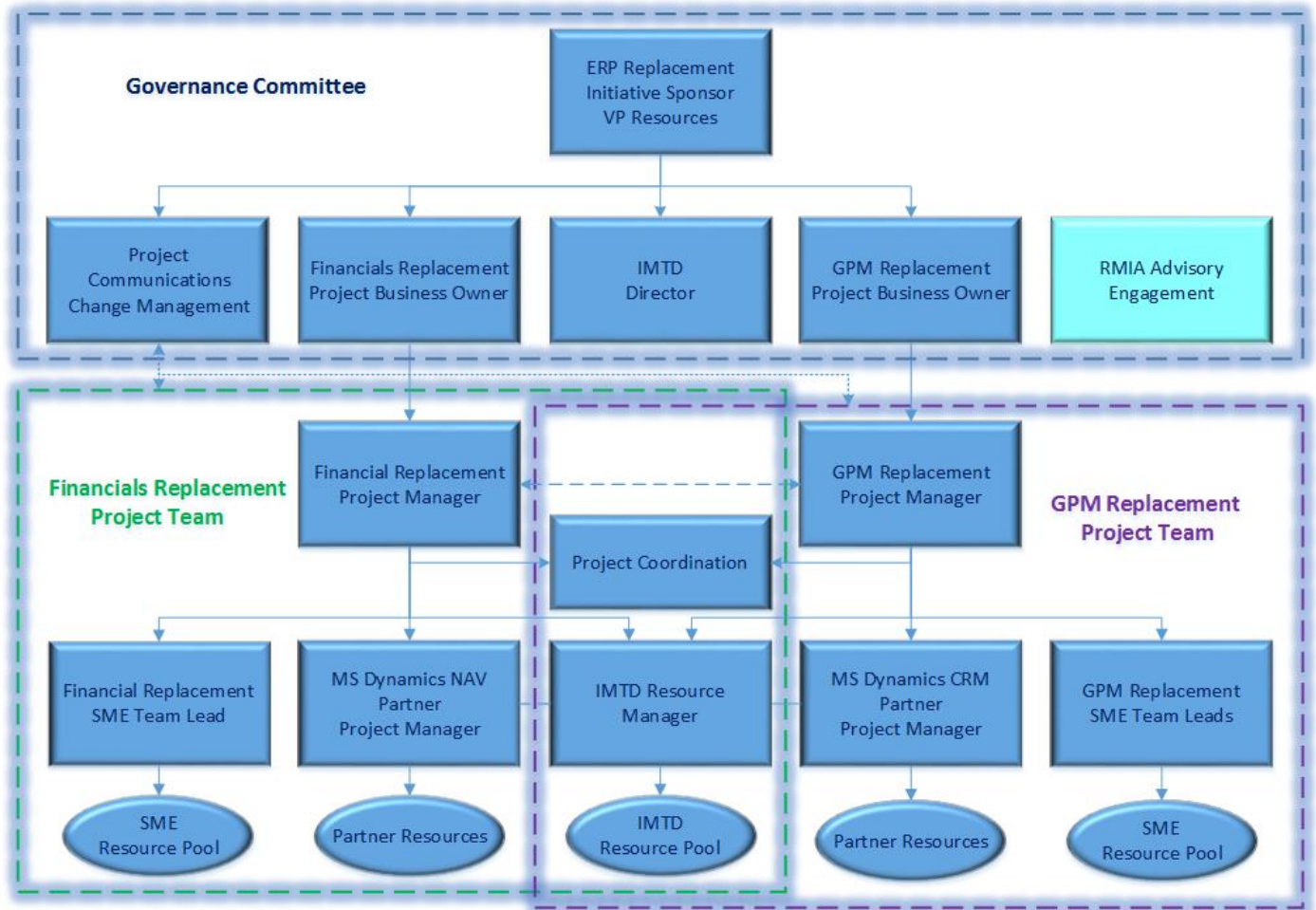
C5. INVOICING

The Proponent shall propose an invoicing schedule.

Important note: IDRC’s payment terms are NET 30.

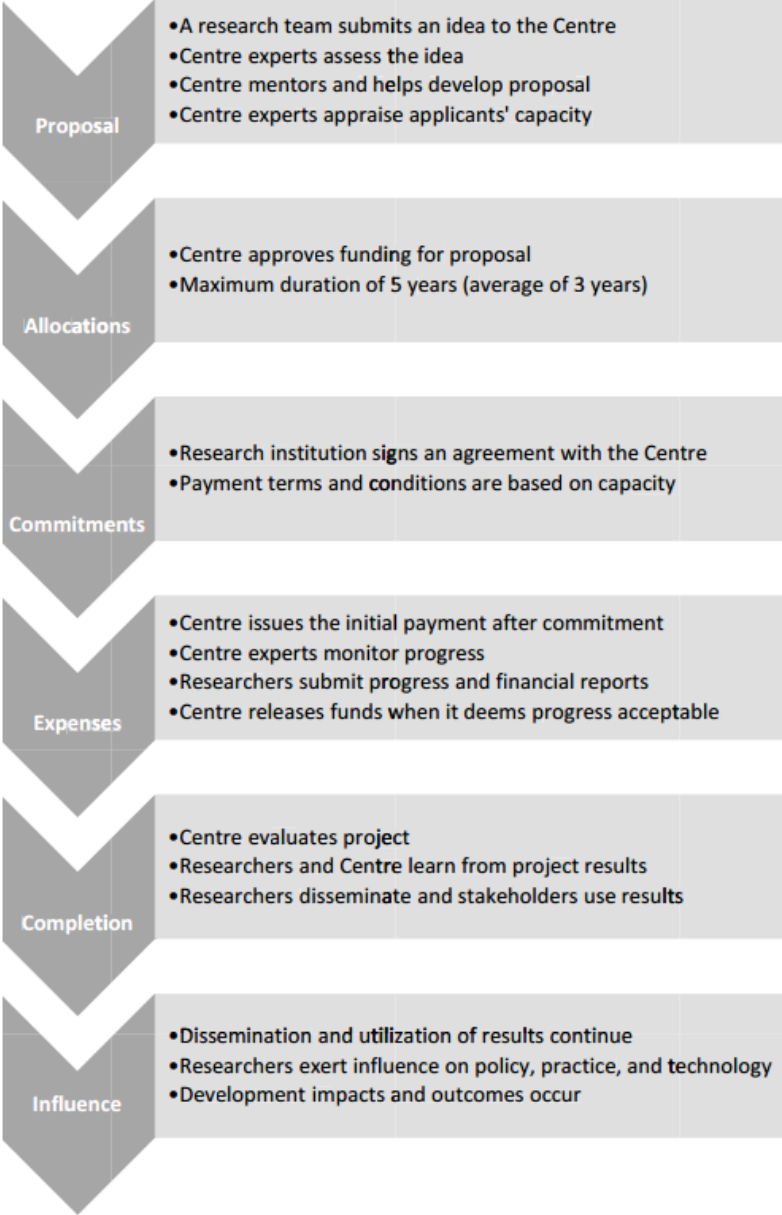
ANNEX D – Project Governance Structure

ERP Replacement Initiative Governance Structure



ANNEX E – Life cycle of Research Projects

LIFE CYCLE OF RESEARCH PROJECTS



ANNEX F – ERP (Microsoft Dynamics NAV) and GPM (Microsoft Dynamics CRM) Integration Points

The foundation of the new integrated systems is to house the financial information of Enterprise Resource Management (ERP) using Microsoft NAV and Microsoft Dynamics CRM configured to provide Grant and Project Management (GPM) functions. IDRC wishes to leverage close integration with Microsoft SharePoint and Office Suite (i.e. Excel) and the inherent features of Microsoft SQL Server (Reporting, Analytical, and Integration Services).

A few principles will guide the integration choices between ERP and GPM.

1. Financial data will primarily reside in ERP for robust native processing and it is desired to keep this information at a summary level.
2. Non-financial data pertinent to management of projects will primarily reside in GPM.
3. Where the same data resides in both, one will be selected as master and synchronization will occur, ideally in real-time. Period open/close status will be respected.
4. Data required to be entered in the alternate application will ideally be transparent, so that users do not need to login and be subjected to an alternate application screen.
5. If a native capability or data structure does not exist, it is permissible to utilize the alternate application to provide that service, as long as it mostly remains transparent.

Some Points of Integration

- Web Service API's (technical)
- Reporting
- Process Flow
- Data Elements

Technical: The technology of three platforms – Dynamics NAV, Dynamics CRM, and SharePoint – enables connectivity between the environments and should be used to enable transparent interaction.

Reporting: Reports or related dashboards capability should be native to each application. Reports may also span applications, which would provide an apparent integration of results and this may be sufficient in some cases.

Workflows: The relay of status or triggering of conditions must be able to span applications. Ideally these would be done transparently. It may also be feasible to identify manually triggered changes in order to continue parts of the process in the alternate application.

Data Elements: The largest aspect of integration will clearly be identifying data elements that should reside in one application or the other or potentially in both and be subject to synchronization, preferably on a near real-time basis and also respecting period open/close status. It may be that data originates in one application and is primarily of use to the other. The following topics will be explored in more detail. It will be essential for these to be understood and optimal choices made for effective integration.

Details of Data Elements

- Tables and Data Items
- Project and Component
- Accounts Payable (AP)
- Externally Funded Projects (EFP)
- Accounts Receivables (AR)
- Time Tracking
- Grouping and Tags
- Budget Planning
- Other Elements

Tables and Data Items

In the legacy version of GPM there are about 60 tables and about 500 unique data elements. A significant part of this is expected to be retained in the new GPM, with some exceptions noted below and a few new extensions. Ideally it is hoped that many elements can be designated to reside distinctly in the appropriate application with only key commonalities and that necessary access would be simply exposed through an interface to the other application if needed.

Project and Component

Allocations are organized around Projects (6 digits). Legally binding commitments are made against subprojects which IDRC calls Components (3 digits). This combination is a key reference data element across many applications and it is essential that this structure or other accommodating mechanism be implemented.

Accounts Payable

Payment requests for projects are remitted on acceptance by the recipient of the grant agreement of a Project-Component and at key Milestones based on acceptable financial and technical reports or other deliverables triggering the creation of an approved invoice. While financials are managed through the ERP the conditions for release may be satisfied by data entered through GPM.

Externally Funded Programs

While IDRC is a grant making organization primarily funded by the Government of Canada, research is also funded in partnership with other contributing Donors which encourages effective leverage and scale. A complexity arises through the collaborative arrangements of research Themes and formal Stage agreements. Revenue is recognized when the related project expenses have been incurred.

Accounts Receivables

One goal with the ERP implementation is to utilize the standard AR module to providing an effective invoice process for EFP's. Some Donor agreements are denominated in foreign currencies.

Time Tracking

Another aspect of reporting EFP's will be to track "billable hours" for some IDRC research participants in order to more accurately report direct expenses to Donors. It will also be necessary to develop metrics and reports to establish standard rates by role.

Grouping and Tags

IDRC research is organized around Program Areas (PA) vetted by the Board of Governors. In turn each PA will include a number of Program Initiatives (or just "Programs") under which individual Projects will be created. Both Programs and Projects have distinct Objectives. There is also a need for flexibility where some projects may be arbitrarily grouped together for administrative or research reasons distinct from PA or Programs hierarchies and tags may also change over time.

Budget Planning

The extensive planning and foreknowledge of research project activities (in GPM) could provide a much more effective basis for budget and forecast exercises (primarily by the budget and Financial Management group), particularly through automated calculations.

Other Elements

As part of reporting as well as risk and administrative management, information is gathered about Institutions (e.g. risk assessments) and geographic locales (geocoding) relating to area of research, impact of research, and regional office responsibility with percentage (%) attributions noted so that global analyses and reporting (such as IATI) can be made. Data may originate in GPM and be analyzed or displayed elsewhere (ERP or public web server).

Grants Process Domains

